

The CEPII list of emerging countries

Countries in the CEPII's list of emerging countries have been selected according to two criteria:

- Per capita GDP of less than half the average of industrialised countries;
- Rate of export growth at least ten percent higher than the average for industrialised countries. This criteria must be fulfilled either during two of the three sub-periods (1985-90, 1990-95, 1995-2002) or in the latest only (1995-2002).

We obtain a list that includes three members of the EU and Korea. Those four countries are dropped, Korea being considered as an industrialised country.

This list have been used in the CEPII work, particularly the CEPII report for the European Commission, DGTrade, 2004, "European Industry Place in the International Division of Labour: Situation and Prospects", Fontagné L., Fouquin M., Gaulier G., Herzog C., Zignago S.

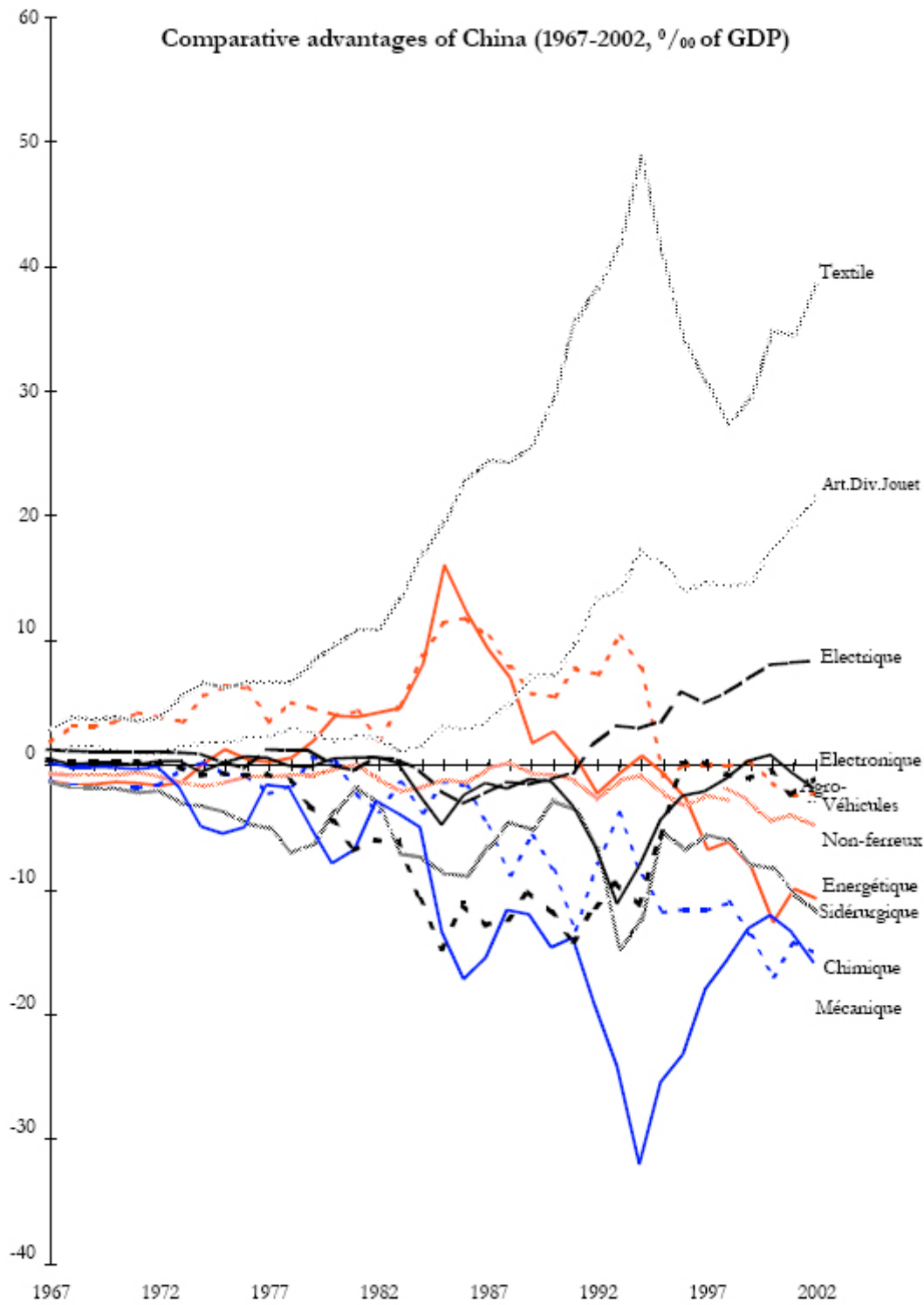
The table below gives the share of each emerging country from this list in the total of manufacturing export in 2004.

| Country | Share in emerging countries manufacturing exports, 2004, percent |
|--------------|--|
| China | 49.4 |
| Malaysia | 9.0 |
| Thailand | 6.8 |
| Brazil | 5.6 |
| India | 5.3 |
| Russia | 4.9 |
| Indonesia | 4.2 |
| Philippines | 3.5 |
| South Africa | 2.7 |
| Argentina | 1.6 |
| Chile | 1.5 |
| Vietnam | 1.3 |
| Pakistan | 1.0 |
| Bangladesh | 0.7 |
| Tunisia | 0.7 |
| Costa Rica | 0.6 |
| Egypt | 0.4 |
| Sri Lanka | 0.4 |
| Ecuador | 0.2 |
| Mauritius | 0.1 |
| Mozambique | 0.1 |
| Uganda | 0.0 |
| Sudan | 0.0 |

**breakdown of variations in market shares by volume 1995-2002:
Triad, BRIC, emerging countries (%)**

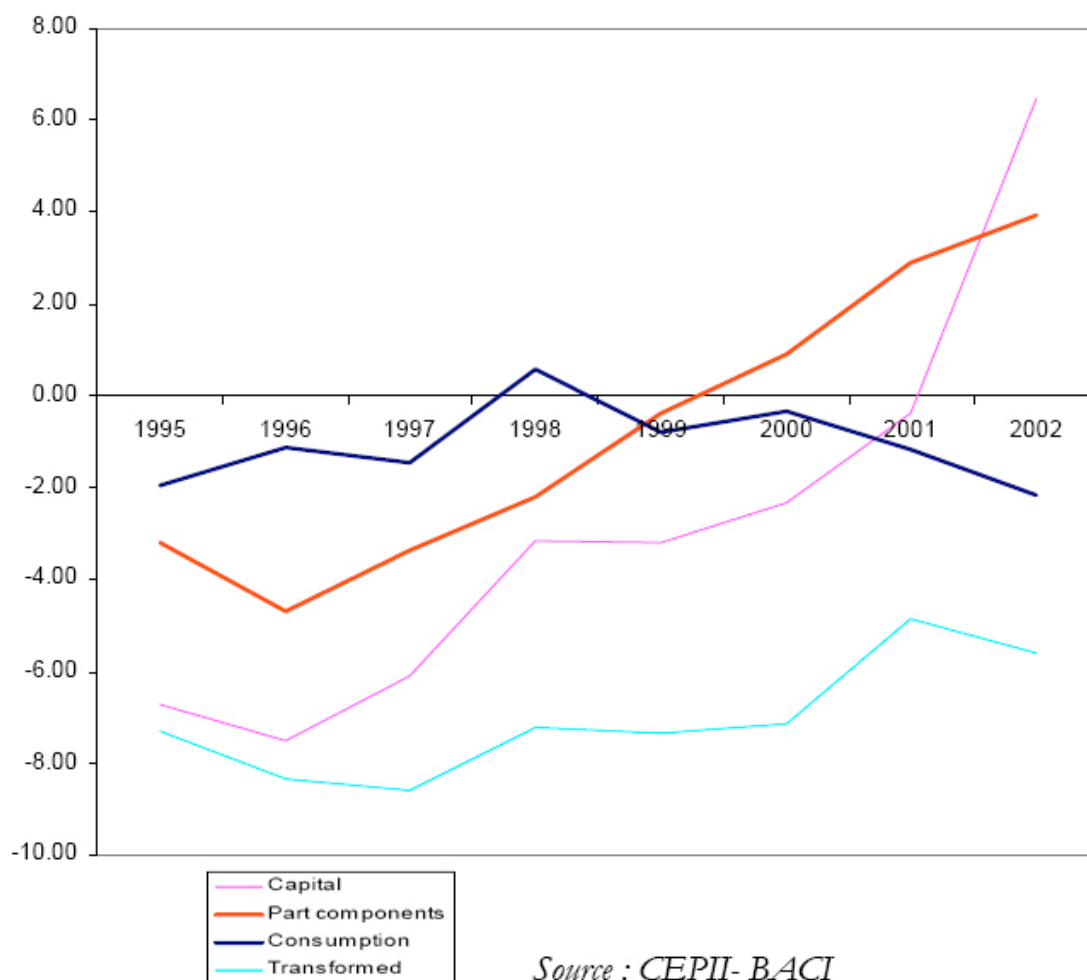
| | Market share growth (1) | Geographic demand effect (2) | Sectoral demand effect (3) | Performance (4) = (1)-(2)- (3) | Geographic adaptation (5) | Sectoral adaptation (6) | Residual competi- tiveness (7)=(4)-(5)-(6) |
|-------------------|-------------------------------|------------------------------------|-------------------------------------|--------------------------------------|---------------------------------|-------------------------------|---|
| United- States | -9.5 | 9.3 | 4.5 | -23.3 | 9.7 | -0.8 | -32.2 |
| Japan | -20.1 | -2.2 | 10.1 | -28.0 | -0.2 | -2.7 | -25.1 |
| EU | -1.4 | 0.6 | 0.1 | -2.1 | -2.5 | 0.2 | 0.3 |
| Brazil | -8.0 | -7.5 | -15.4 | 14.9 | 3.2 | 1.5 | 10.2 |
| China | 62.7 | -14.4 | -10.7 | 87.8 | -0.1 | 4.1 | 83.7 |
| India | 16.1 | -6.1 | -14.7 | 36.9 | -1.0 | -0.1 | 37.9 |
| Russia | -11.4 | 7.0 | -14.5 | -3.9 | -2.8 | -2.2 | 1.0 |
| Argentina | -16.1 | -8.2 | -19.3 | 11.4 | 2.2 | -3.2 | 12.5 |
| Chile | -4.8 | -5.6 | -20.2 | 21.0 | 7.6 | -2.5 | 15.9 |
| Colombia | -16.6 | 4.5 | -20.1 | -0.9 | 2.2 | 3.4 | -6.6 |
| Equator | -18.8 | 1.2 | -27.7 | 7.6 | -7.2 | 0.4 | 14.3 |
| Egypt | -9.5 | 0.5 | -20.8 | 10.8 | -2.2 | -0.9 | 13.9 |
| Indonesia | 13.1 | -7.5 | -15.4 | 36.0 | -2.4 | 1.8 | 36.5 |
| Malaysia | 2.2 | -10.6 | 5.8 | 7.0 | 1.3 | 3.2 | 2.5 |
| Mexico | 76.1 | 6.6 | 2.3 | 67.2 | -4.6 | 1.0 | 70.8 |
| Philippine | 33.5 | -7.5 | 3.5 | 37.5 | -0.7 | 5.6 | 32.6 |
| South-Africa | 1.0 | -10.1 | -15.5 | 26.5 | 1.2 | -0.4 | 25.7 |
| Thailand | 8.2 | -9.2 | -2.4 | 19.7 | 0.3 | 0.0 | 19.5 |
| Tunisia | 5.5 | 0.1 | -20.4 | 25.8 | -5.1 | -1.7 | 32.5 |
| Turkey | 31.7 | -2.4 | -17.5 | 51.6 | -1.5 | 0.7 | 52.5 |
| Vietnam | 75.2 | -11.4 | -26.0 | 112.6 | 0.5 | -1.0 | 113.0 |

Source: data CEPII-BACI



Source : CEPII-CHELEM

Position of the emerging countries in upmarket technology products, by stage of assembly (% of the world market)



Market positions of the emerging countries, by branch (1967-2002, % of world trade)

| Produit | 1967 | 1973 | 1980 | 1986 | 1991 | 2002 |
|-------------------------------|-------|-------|-------|------|-------|------|
| Electronique grand public | -6.7 | -3.3 | -8.4 | 0.8 | 11.9 | 27.2 |
| Conserves animales | 6.4 | 5.4 | 4.7 | 11.1 | 19.6 | 26.1 |
| Vêtements de bonneterie | -0.9 | 2.2 | 3.2 | 8.1 | 16.7 | 20.4 |
| Vêtements de confection | -1.9 | 1.4 | 5.1 | 9.5 | 16.1 | 19.2 |
| Ouvrages en bois | 4.6 | 8.1 | 7.1 | 17.0 | 32.2 | 19.0 |
| Corps gras | 1.3 | 4.4 | 5.8 | 8.7 | 11.9 | 18.9 |
| Minerais non ferreux | 14.7 | 16.6 | 15.4 | 15.4 | 16.1 | 18.8 |
| Charbon | 0.6 | 1.0 | 8.8 | 7.1 | 10.5 | 17.4 |
| Meubles | -1.4 | 1.1 | 1.3 | 2.7 | 7.6 | 17.0 |
| Ciment | -1.3 | 3.3 | -5.4 | -0.9 | 0.7 | 16.5 |
| Autres produits agricoles | 13.1 | 12.5 | 16.4 | 20.7 | 20.5 | 15.6 |
| Matériel informatique | -7.3 | -4.1 | -6.7 | -3.2 | -0.8 | 11.9 |
| Boissons | -0.2 | 0.9 | -0.9 | 2.4 | 3.1 | 11.4 |
| Viandes et poissons | 13.9 | 14.5 | 10.4 | 12.4 | 12.7 | 11.1 |
| Cuir | 0.4 | 4.7 | 4.2 | 4.9 | 7.6 | 10.1 |
| Or non monétaire | 99.8 | 99.7 | 92.6 | 66.0 | 13.5 | 10.0 |
| Véhicules utilitaires | -18.8 | -12.2 | -15.8 | -4.8 | -7.0 | 9.9 |
| Gaz naturel | -9.1 | -5.9 | 13.2 | 14.5 | 17.9 | 9.7 |
| Sucre | 10.9 | 11.9 | 4.3 | 5.0 | 7.8 | 9.3 |
| Tapis | -4.7 | -0.6 | 0.5 | 4.0 | 5.5 | 8.8 |
| Bijoux | 3.8 | 4.2 | 7.5 | 5.5 | 1.6 | 6.9 |
| Electroménager | -8.4 | -4.6 | -8.3 | -3.3 | -2.1 | 6.6 |
| Conserves végétales | 8.3 | 8.2 | 6.5 | 8.2 | 10.7 | 6.4 |
| Prod. agric. non comestibles | 17.0 | 19.2 | 18.8 | 10.9 | 10.2 | 6.4 |
| Métallurgie non ferreuse | 11.6 | 9.4 | 12.8 | 12.2 | 8.6 | 6.3 |
| Aliments pour animaux | 15.1 | 10.1 | 8.3 | 11.2 | 9.0 | 5.3 |
| Pétrole brut | 1.6 | 3.5 | 7.7 | 12.3 | 8.8 | 4.7 |
| Matériel électrique | -16.3 | -15.0 | -13.7 | -4.8 | -6.4 | 4.6 |
| Minéraux nda | 10.1 | 8.3 | 4.4 | 5.8 | 4.0 | 4.5 |
| Matériel de télécommunication | -15.0 | -9.2 | -8.3 | -7.6 | -6.9 | 3.5 |
| Automobiles particulières | -6.4 | -5.2 | -6.7 | -1.2 | -0.4 | 3.4 |
| Verre | -6.9 | -4.8 | -5.6 | 1.0 | 1.6 | 3.2 |
| Produits céréaliers | -18.0 | -10.2 | -12.4 | -8.3 | 1.4 | 2.6 |
| Total | -1.2 | -0.3 | -0.3 | 0.9 | -0.3 | 2.3 |
| Ouvrages métalliques | -12.5 | -12.2 | -11.2 | -6.9 | -8.2 | 1.9 |
| Fournitures électriques | -13.3 | -9.5 | -9.1 | -4.2 | -5.1 | 1.2 |
| Céramique | -7.6 | -5.9 | -7.1 | -6.0 | -4.7 | 0.5 |
| Composants électroniques | -5.6 | -0.1 | 8.5 | -0.6 | -1.9 | -0.2 |
| Horlogerie | -6.6 | -4.4 | -3.8 | -2.5 | -2.3 | -0.3 |
| Appareils d'optique | -8.0 | -5.0 | -5.9 | -3.0 | -2.8 | -0.4 |
| Articles manufacturés nda | -5.2 | -4.0 | -5.2 | -2.5 | -1.1 | -0.8 |
| Articles en caoutchouc | -8.8 | -5.1 | -6.6 | -4.3 | -4.9 | -1.1 |
| Instruments de mesure | -9.5 | -8.3 | -9.6 | -5.9 | -7.2 | -1.1 |
| Produits raffinés du pétrole | -2.1 | -1.4 | -1.6 | 0.7 | -2.9 | -1.6 |
| Première transform. du fer | -8.8 | -5.9 | -10.6 | -3.9 | -3.7 | -1.7 |
| Papier | -7.7 | -6.9 | -7.4 | -3.8 | -6.6 | -2.4 |
| Non ventilés | -2.0 | -2.7 | -4.6 | -4.2 | -4.6 | -2.7 |
| Tabacs manufacturés | -6.5 | -4.9 | -6.6 | -6.2 | -6.3 | -2.9 |
| Chimie minérale de base | -6.4 | -5.8 | -1.7 | -2.8 | -4.5 | -3.2 |
| Moteurs | -15.8 | -12.4 | -16.1 | -8.0 | -10.1 | -3.8 |
| Aéronautique et espace | -9.4 | -7.7 | -11.4 | -6.0 | -8.8 | -4.3 |
| Quincaillerie | -10.3 | -7.5 | -9.0 | -5.7 | -8.1 | -4.4 |
| Navires | -3.5 | -3.2 | -9.9 | -3.5 | -2.8 | -4.4 |
| Electricité | 0.0 | -0.3 | 0.0 | -0.1 | 0.1 | -4.5 |
| Produits de toilette | -8.8 | -7.7 | -12.1 | -4.8 | -4.7 | -4.5 |
| Imprimés | -5.6 | -5.7 | -7.2 | -4.2 | -4.6 | -5.1 |
| Coke | -4.5 | -2.9 | -4.7 | -3.9 | -4.4 | -5.2 |
| Produits pharmaceutiques | -11.1 | -9.6 | -8.1 | -7.3 | -7.3 | -5.5 |
| Chimie organique de base | -10.2 | -10.2 | -11.0 | -8.4 | -7.7 | -5.8 |
| Matériel agricole | -14.2 | -11.9 | -16.5 | -7.5 | -9.0 | -6.0 |
| Fer et acier | -6.9 | -7.2 | -8.8 | -2.2 | -9.2 | -6.1 |